

Basic Training Checklist

REALTOR Association:

___What benefits your state association provides for you. Are your forms included in your dues? Any e-signature programs? What things do you have available that you can use?

___Your Code of Ethics training. You need to understand the rules of working with clients and other agents and make sure you understand how not to violate the rules

___RPR Login

___NRDS Number

___NAR Login

___State AR Login

___Local AR Login

MLS:

___How to search

___How to search using a map feature

___How to add listings into a cart

___How to email properties and set clients up on an auto search

___How to create a CMA

___Where market stat info is published and how often

___What status' of listings are available. Active, pending, expired, withdrawn, cancelled, etc and exactly what each one means

___How to read showing instructions and know whether there is a lockbox

___How to look up property history

___Tax records and how to look up square footage, year built, lot size, permits, ownership

___How to search tax records by owner name, address and radius if possible

___How to access lockboxes and does lockbox provider have website to log in to

___How to enter a new listing and what rules do you need to know about photos, remarks, etc

___How to change the status of your listings if they go under contract or need to withdraw

___How to change the price of your listings or update comments, etc

___How to update your MLS profile and add your photo and other info

Brokerage Training:

PROGRAMS/SOFTWARE:

- ___ Forms
- ___ E-Signatures
- ___ Tax Record Database
- ___ Intranet or Back End Website
- ___ Transaction Management Software
- ___ CRM
- ___ Lead Platform (if available)
- ___ Email Platform
- ___ Marketing Platform (if available)
- ___ Training Resources
- ___ Company Facebook Group or Group App/Portal for Communicating
- ___ Fax Number and How to Send/Receive Faxes
- ___ Using the Printer and Scanner
- ___ Door Lock/Key for All Available Office Locations
- ___ Office Supplies and What to do if Out
- ___ Tech Support, How to Contact and When Available

COMPANY PROTOCOL:

- ___ Who Reviews Your Contracts?
- ___ What's the Process for Reviewing Paperwork and Time Frame Requirements?
- ___ Who Answers Your Client or Contract Questions?
- ___ Who Reviews Your Marketing and Advertising? What is That Process?
- ___ Is there a Transaction Coordinator available to Help You Gather and File Your Contract Paperwork? How Much Does that Cost and How Does it Get Paid? Is this Required?
- ___ Are there Any Specific Company Forms (Escrow Cover Sheets or Client Engagement Forms) Required for Buyers or Sellers?
- ___ Is there a Preferred Title Company? Preferred Lender? Are you Required to Use Them?
Is there an Incentive to Use Them?
- ___ Is there a Company Meeting? How Often? Where? What Time? What Should You Do if You Can't Make It?

- ___ Is there a Regular Company Listings Tour? When and Where and How Often? What Time Does it Start and End? Does Everyone Caravan or Go Separately? Is a Tour Sheet Available?
- ___ Do you have Company Sales Minimums? What Are They if So?
- ___ Are There Any Other Requirements to Remain on the Team?
- ___ Is Floor Time Available? How Do You Sign Up? How Long Are the Shifts? What Training Will You Need Prior to Your First Shift? What Will Your Responsibilities Be During Your Shift? What Should You Do if You Can't Make it and Who Do You Notify?
- ___ Do You Receive a Desk and Computer? Where is it? Is it for Your Exclusive Use or Shared?
- ___ Where are the Printers and Your Mailbox Located? How Do You Send Outgoing Mail?
- ___ What's the Protocol for Reserving a Conference Room to Meet Clients?
- ___ Are there Community or Other Company Events that You Should Know About? Is Participation Required?
- ___ What's the Protocol and Procedures for Hosting Open Houses for Other Agents in the Office? What Training is Required Before You are Allowed to Host One? Is Someone Available to Accompany You for Your First One?
- ___ How Do You Get Listing Signs Up and Down? Who Pays for That?
- ___ How Do You Get Business Cards? Is there a Photographer Recommendation for Your Headshot Photo?
- ___ What is the Company Minimum Commission for Listings? What Types of Listings Are You Allowed to Take? Exclusive Right to Sell Only?
- ___ Are Buyer Broker Agreements Required? Does the Company Have a Specific Form for Those?
- ___ Are You Allowed to Perform Dual Agency? Are there Any Restrictions About That?
- ___ Is there a Mentor that Can Help Me? Who is It (or Who Are They if More Than One) and Do They Charge for Their Help? How Much if So? What Would that Mentor Help Me With and For How Long?
- ___ Who is My Main Trainer in the Company?
- ___ What Does the Office Staff Help With and How Do I Best Ask for Their Help or Contact Them? What Hours Do They Work?
- ___ Who Will Help Me Learn the Company Software/Resources? Are there Online Training Videos Available for Those Things? Will I have Group Classes or One on One Training?

REAL ESTATE TRAINING:

- ____Life of An Escrow (All the Steps A-Z in Order)
- ____How to Write a Purchase Offer
- ____How to Write a Listing Agreement
- ____Filling Out and Understanding Repair Addendums
- ____Filling Out and Understanding Other Common Addendums
- ____Types of Loans and Some Info About Each One
- ____Reading and Understanding a Pre-lim
- ____What to Do with Earnest Money and What's the Customary Amount in Your Area
- ____Who Opens Escrow (buyer or seller) And Who Chooses Escrow (buyer or seller)
- ____Safety Protocols and Tips
- ____What to Say and Not Say to Clients, Leads and Other Agents
- ____CMA's -How to Valuate Property and Create an Accurate CMA
- ____Company CMA Tools -Format and Possible Software
- ____Company Marketing for Your Listings -Listing Presentation Tools
- ____How to Perform Effective and Safe Open Houses
- ____REO's
- ____Short Sales